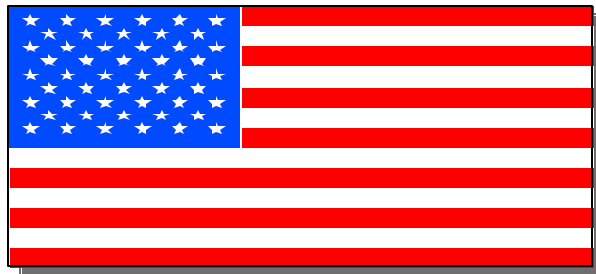


The U.S. Pistachio Industry Situation

Horticultural & Tropical Products Division
Foreign Agricultural Service



Updated March 2002

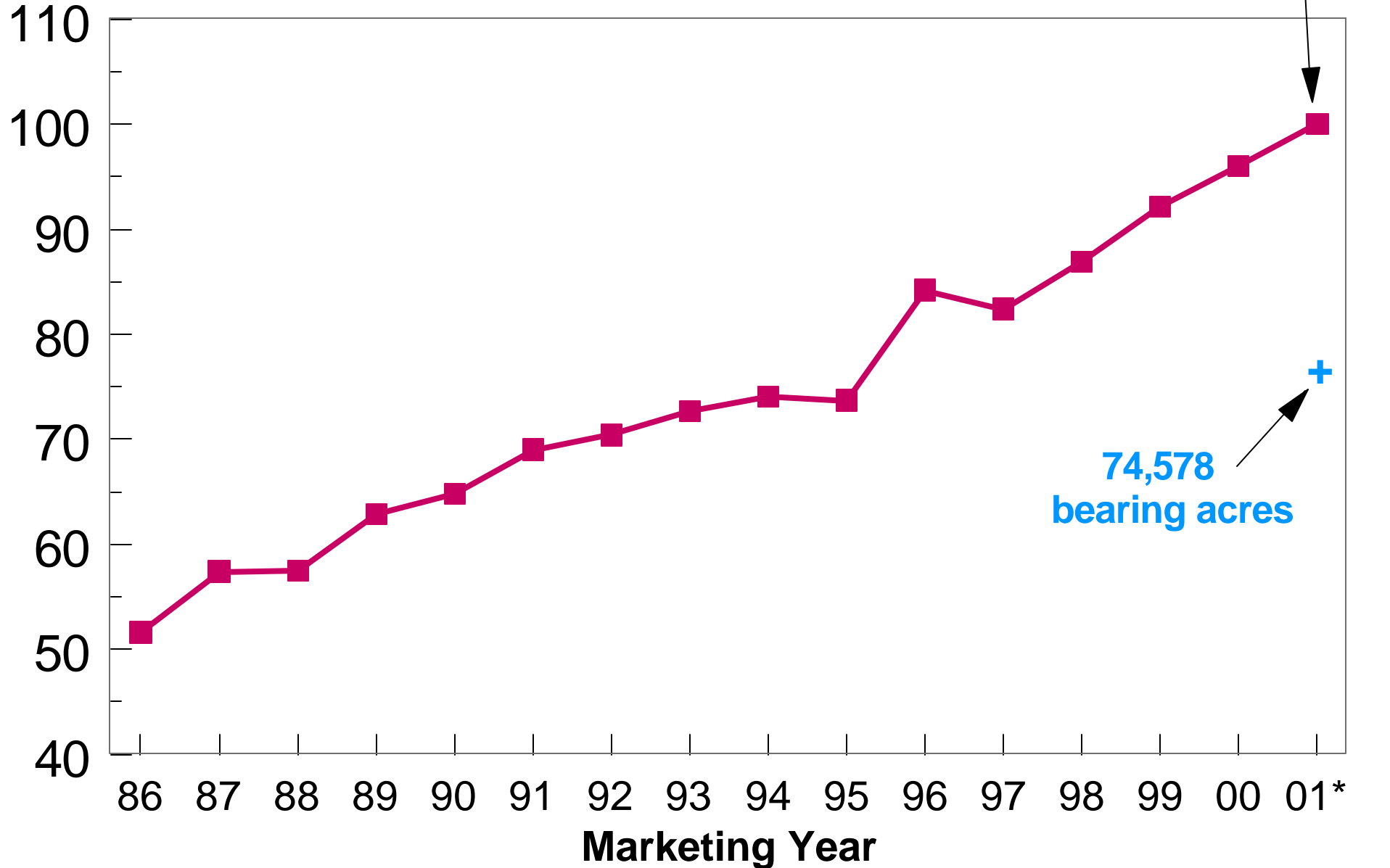
U.S. Pistachio Industry Facts

- By value, pistachios are an important horticultural export commodity (\$109 million in Calendar Year 2001).
- Virtually all of the commercially produced pistachios in the U.S. are grown in California.
- There are approximately 550 pistachio growers in the United States.
- Over 40% of tree nuts in the U.S. are eaten in cereals and desserts.
- The U.S. produces roughly 25% of the world's pistachio supply.
- Marketing Year 2000/01* crop reached a record 109,588 metric tons with a value of over \$235 million.
- The 2001/02 crop is forecast at 90,720 metric tons, a 17% decrease from the previous year (alternate bearing season).
- Pistachio bearing acreage for Marketing Year 2001/02 is estimated at 74,578 acres.

* - Marketing Year for pistachios is September-October

California Pistachio Acreage (Bearing & Non-Bearing) is Growing Steadily

(000) Acres



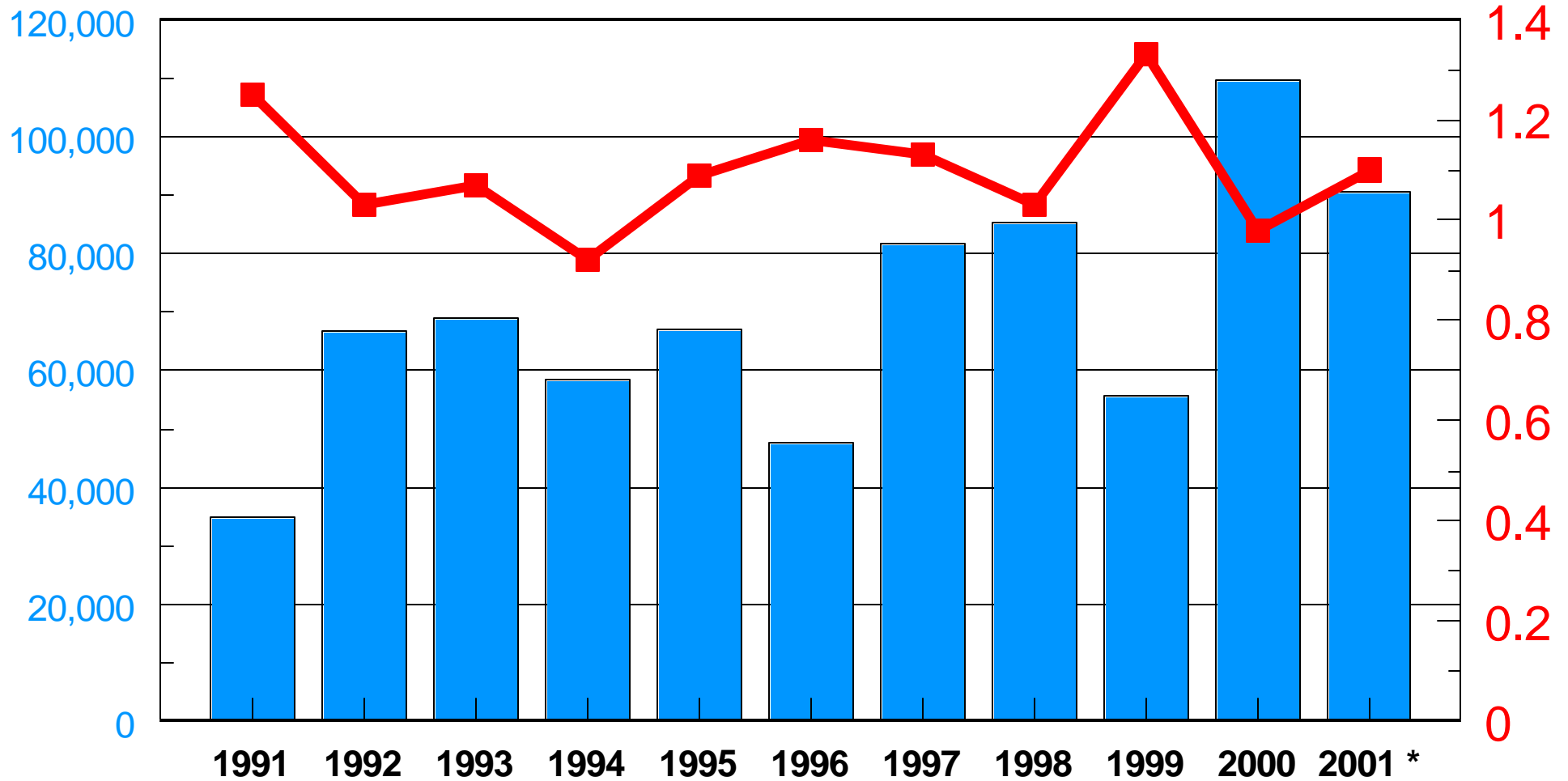
* - Forecast

Source: CASS

California Pistachio Production

Metric Tons

\$ per Pound

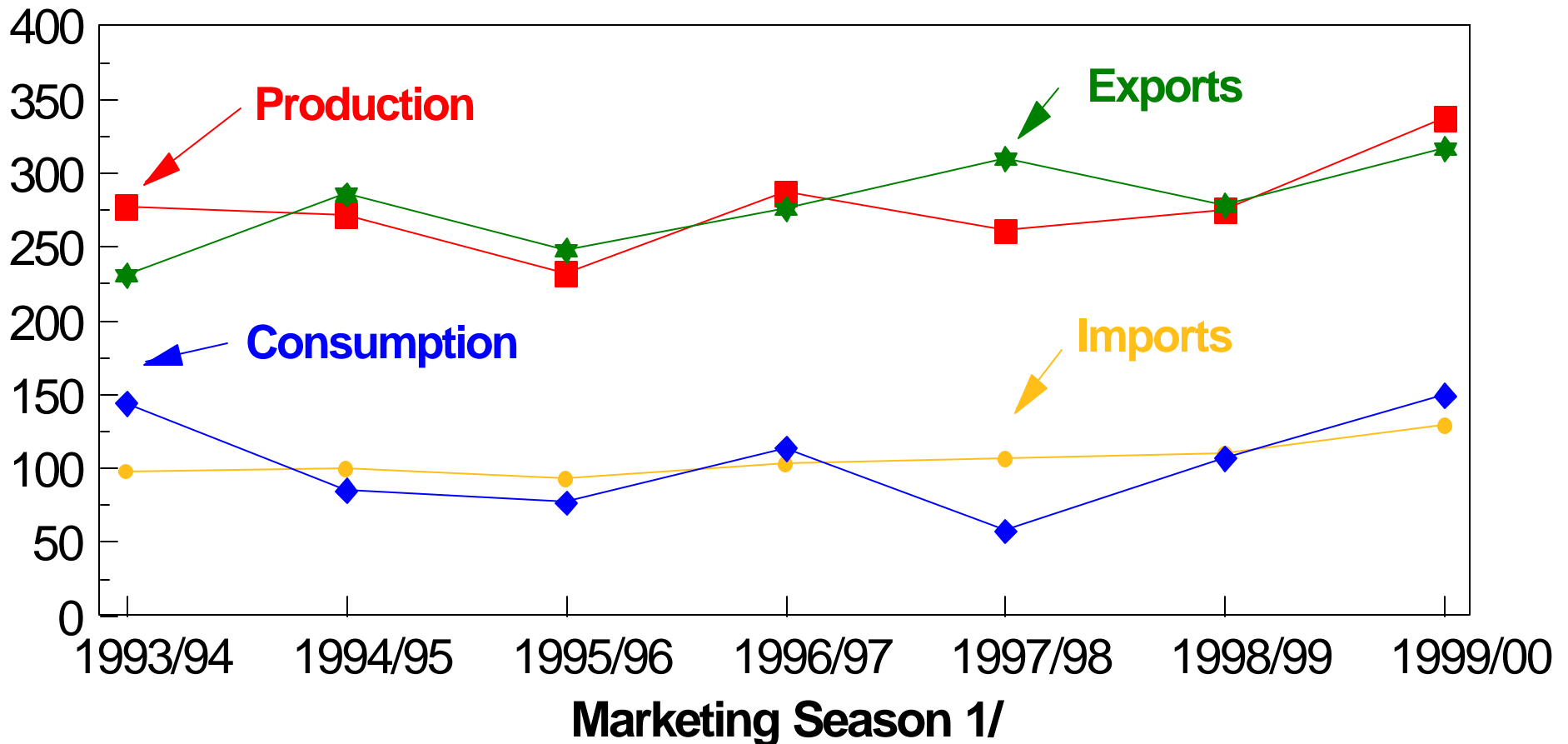


* - Forecast

Sources: CASS

The U.S. Tree Nut Market

Thousand Metric Tons

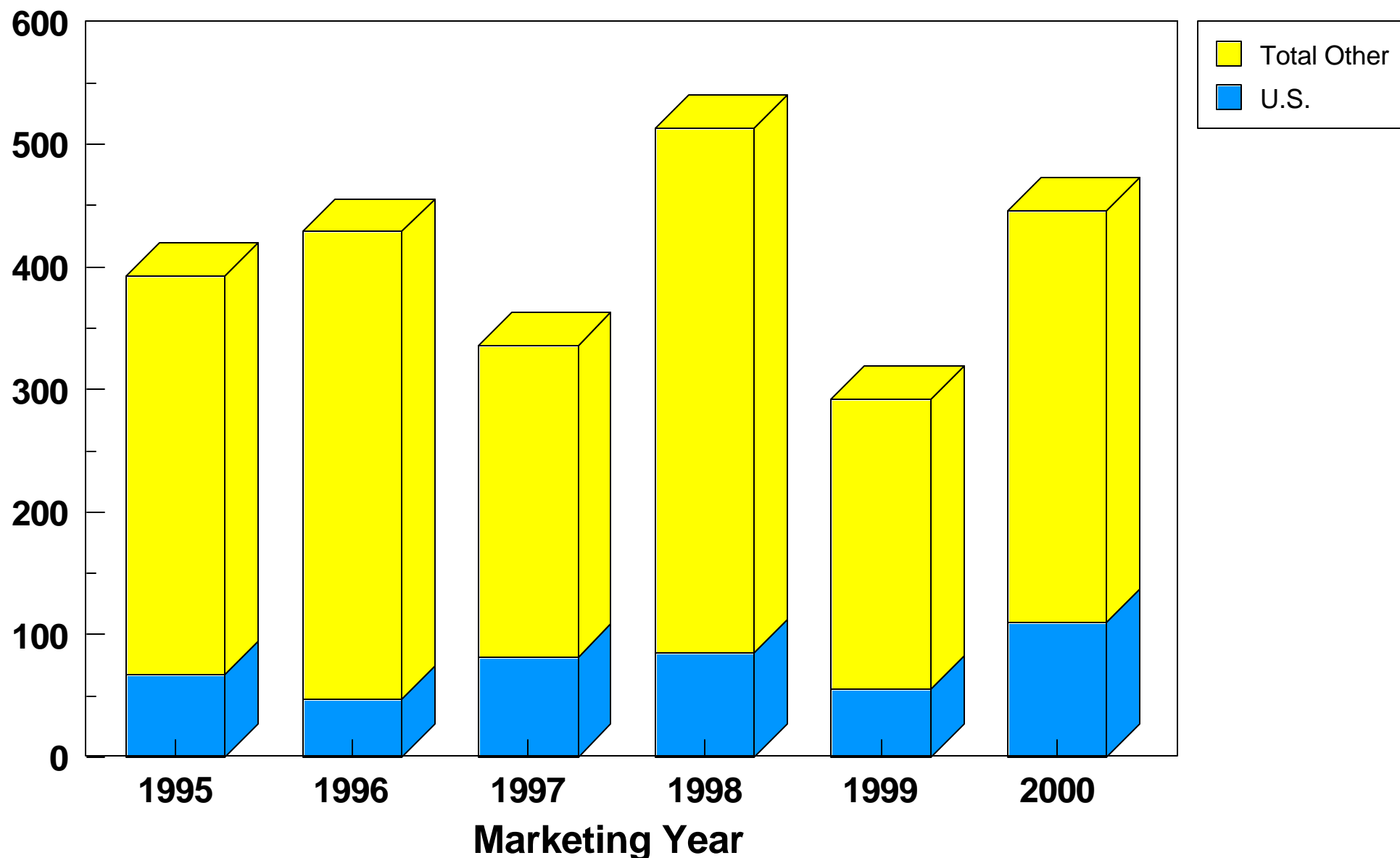


Source: Economic Research Service, USDA

1/ Beginning July 1 for almonds, hazelnuts, macadamia, and peacans; August 1 for walnuts; September 1 for pistachios

U.S. Share of World Pistachio Production

Thousand MT



"World" consists of the U.S., Iran, Turkey, Syria, Greece, & Italy.

Commercial Production of Pistachios in Major Producing Countries

Million Pounds

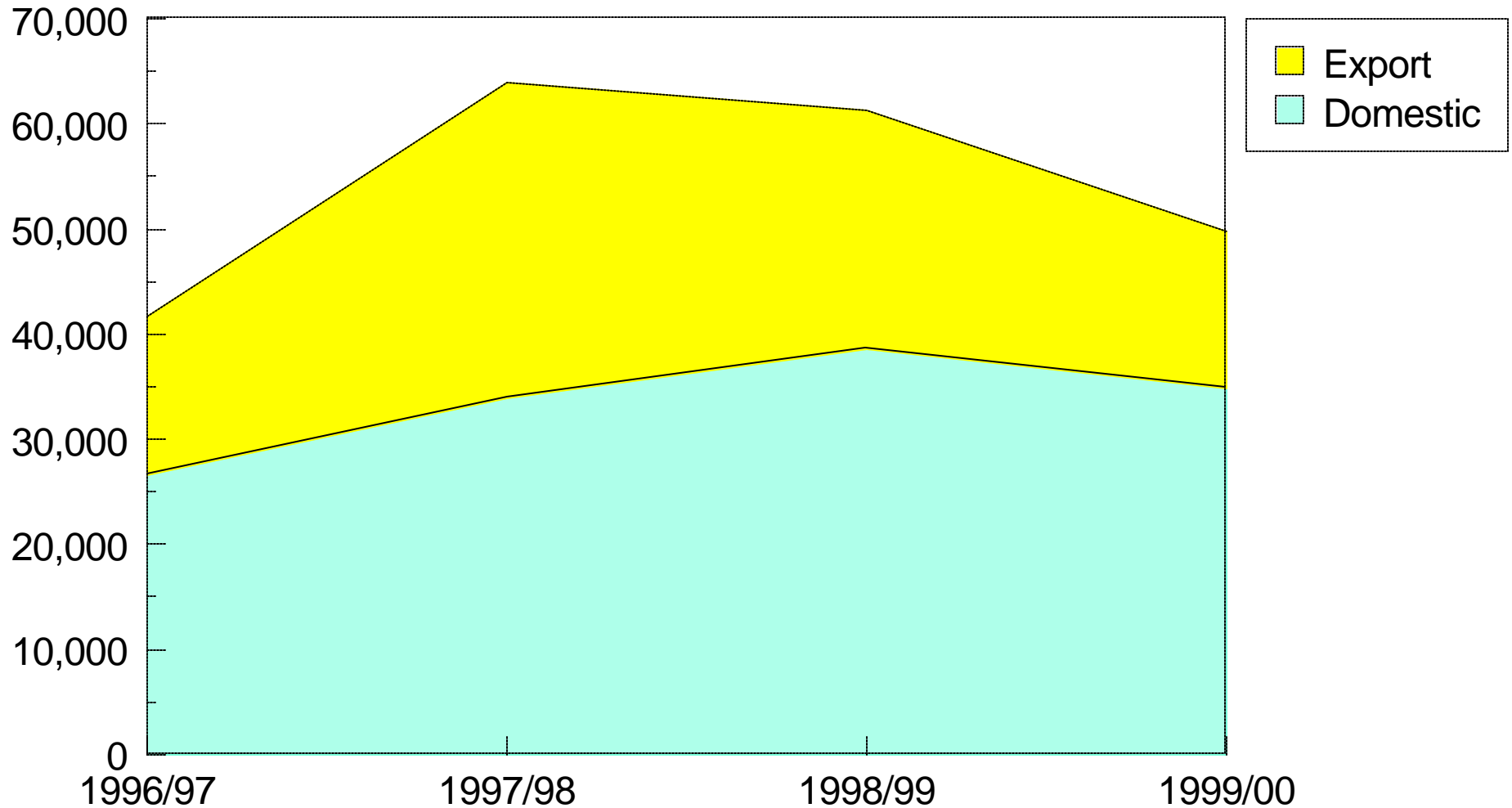
MY	Iran *	U.S.A.	Turkey	Syria	Greece	Italy	U.S.A. % of Total
1991/92	401.2	76.3	99.2	24.0	5.0	6.6	13%
1992/93	445.3	146.5	44.0	44.0	10.0	0.6	21%
1993/94	504.9	150.9	110.0	48.4	9.0	8.8	18%
1994/95	429.9	128.3	55.1	52.9	9.3	0.7	19%
1995/96	518.1	147.7	66.1	35.3	8.8	4.9	19%
1996/97	175.0	104.3	88.2	39.7	9.6	0.7	25%
1997/98	150.0	179.5	88.1	33.1	11.0	8.8	38%
1998/99	375.0	187.5	55.1	79.4	11.0	n/a	27%
1999/00	154.0	122.4	88.0	66.3	11.0	2.4	28%
2000/01	452.0	241.6	132.3	68.3	14.3	0.2	27%

Source: USDA, California Pistachio Commission

*** - Iran Ministry of Agriculture (Figures cannot be verified.)**

Domestic & Export Shipments of Open Inshell Pistachios

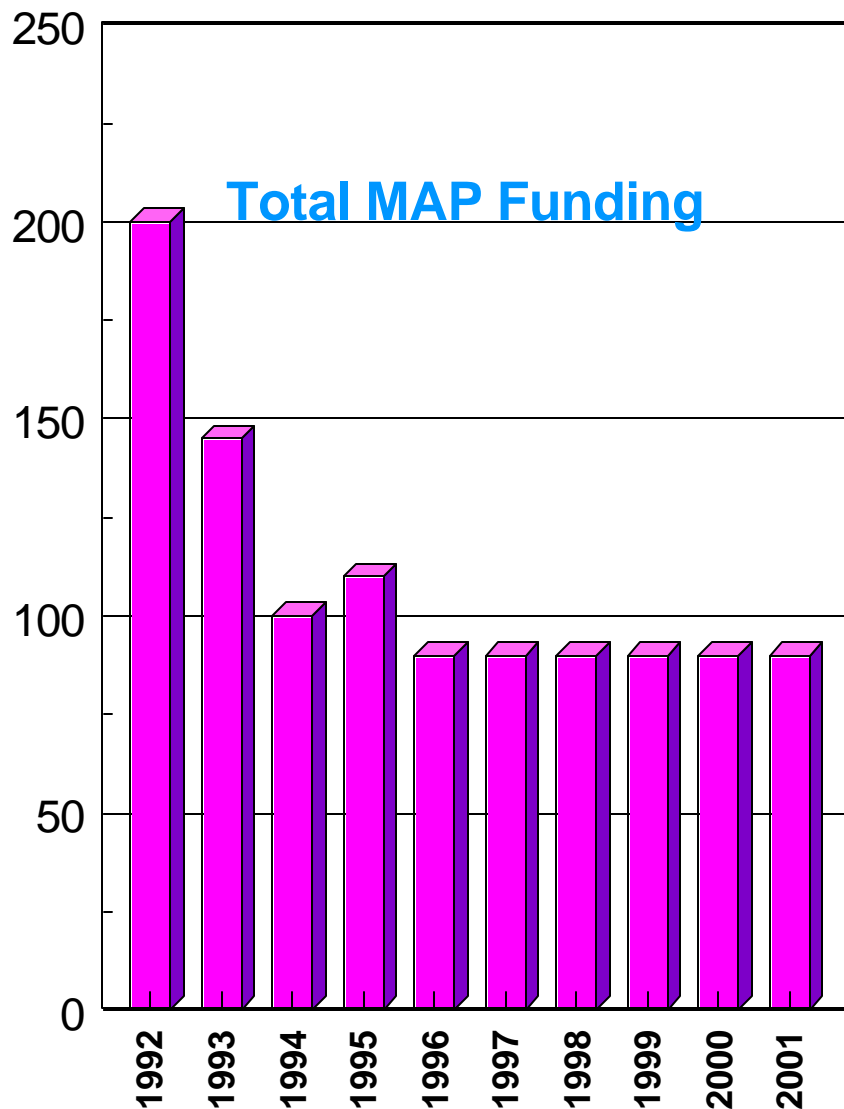
Metric Tons



Source: California Pistachio Commission
Marketing Years 1996/97 - 1999/00

Market Access Program (MAP) Funds Have Been Important to U.S. Pistachio Promotional Efforts

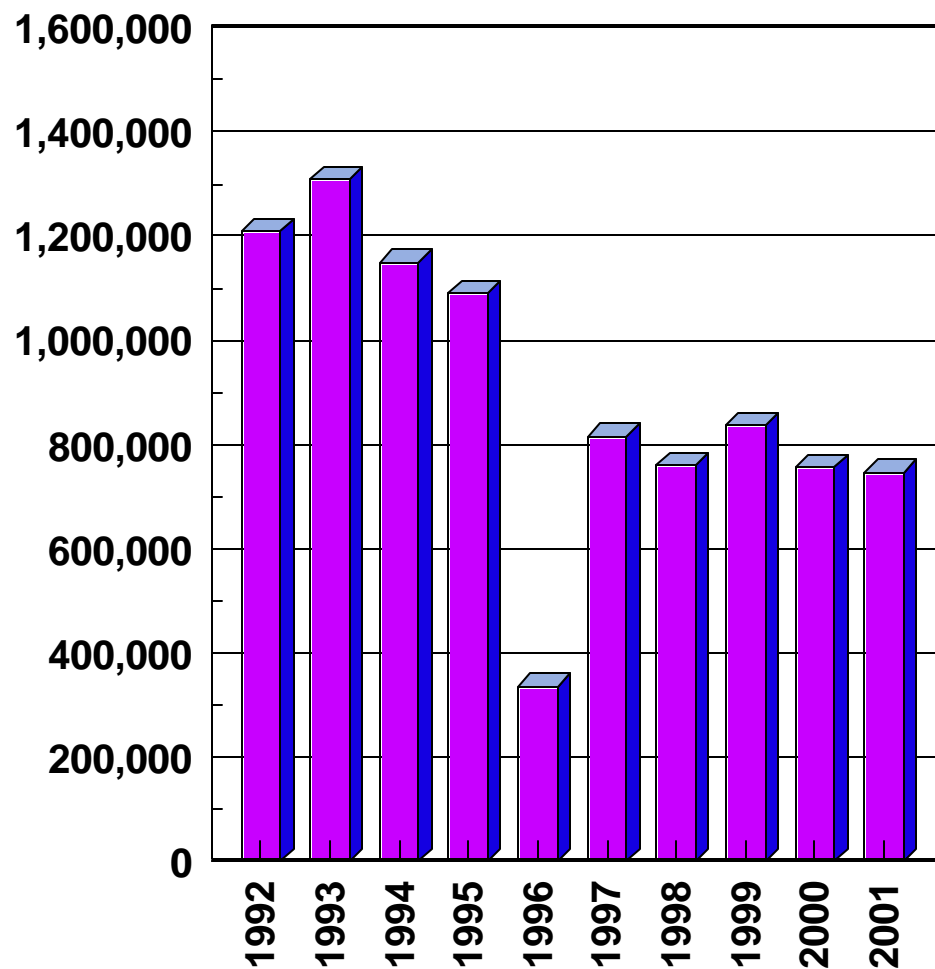
\$ Million



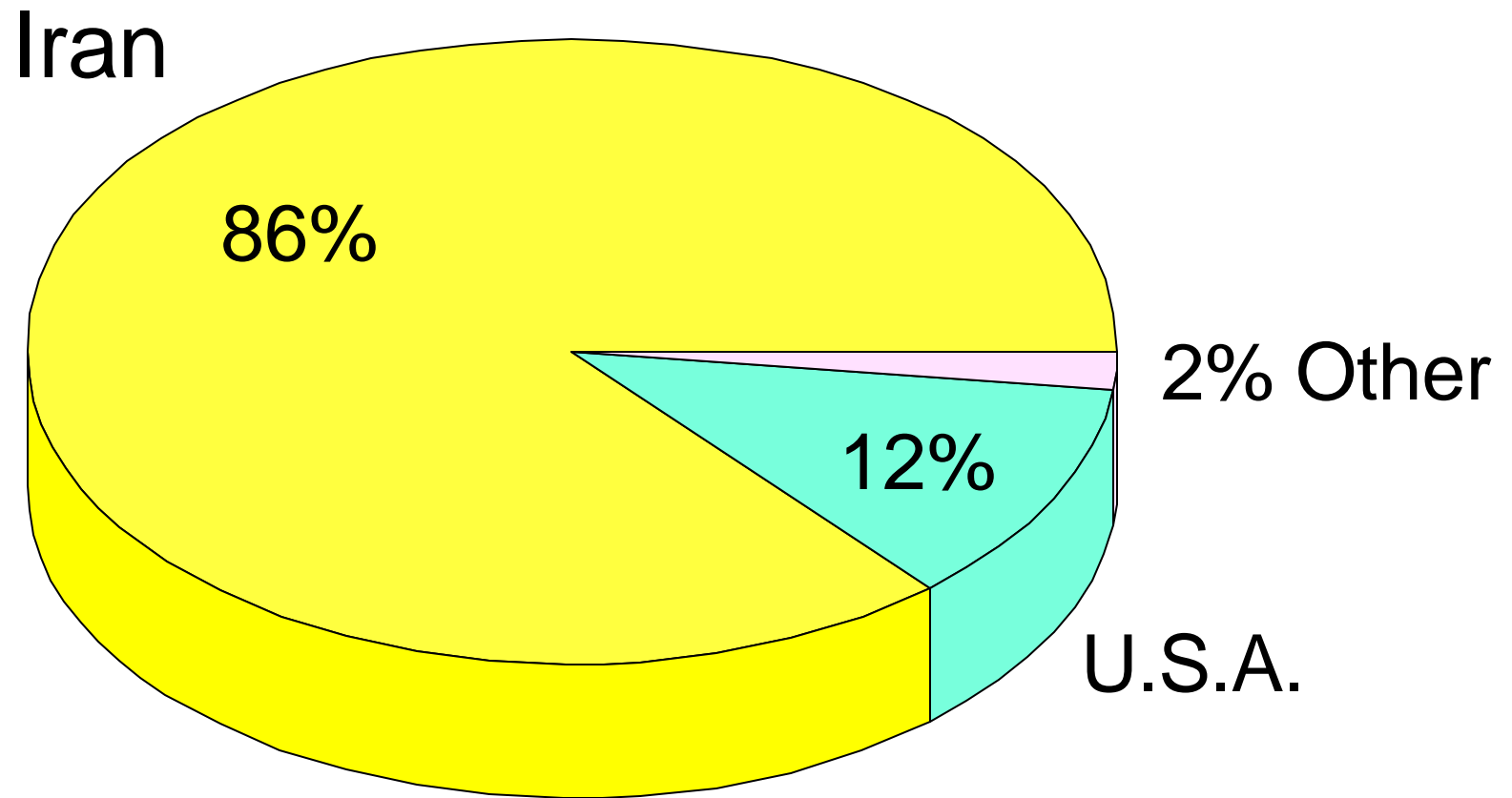
Fiscal Years

Share of MAP Allocated to U.S. Pistachio Industry

U.S. Dollars



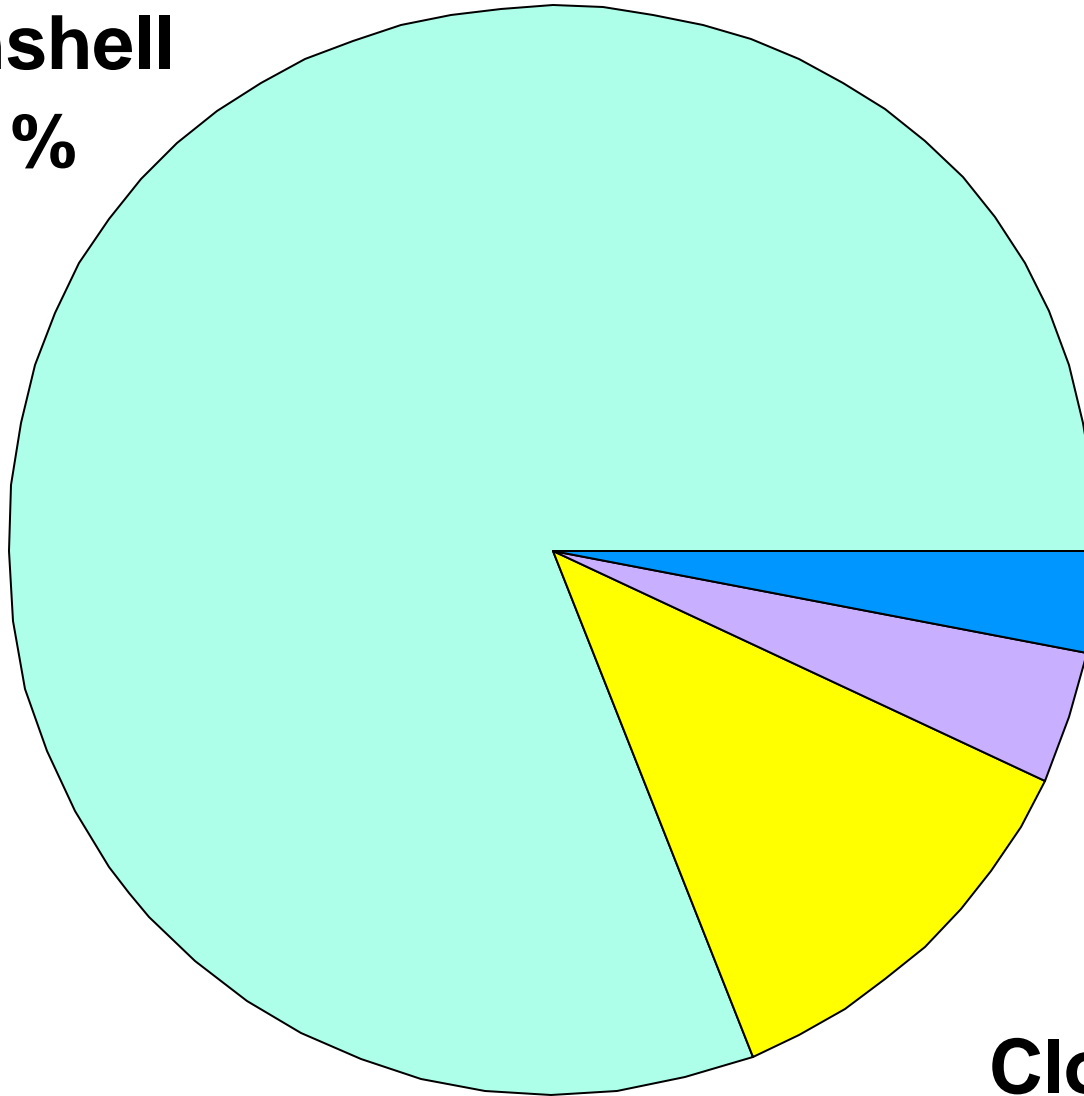
The U.S. is the second largest exporter of pistachios in the world. Iran is the largest exporter.



Pistachio Export Shipments by Product Type

Marketing Year 2000

Open Inshell
81%



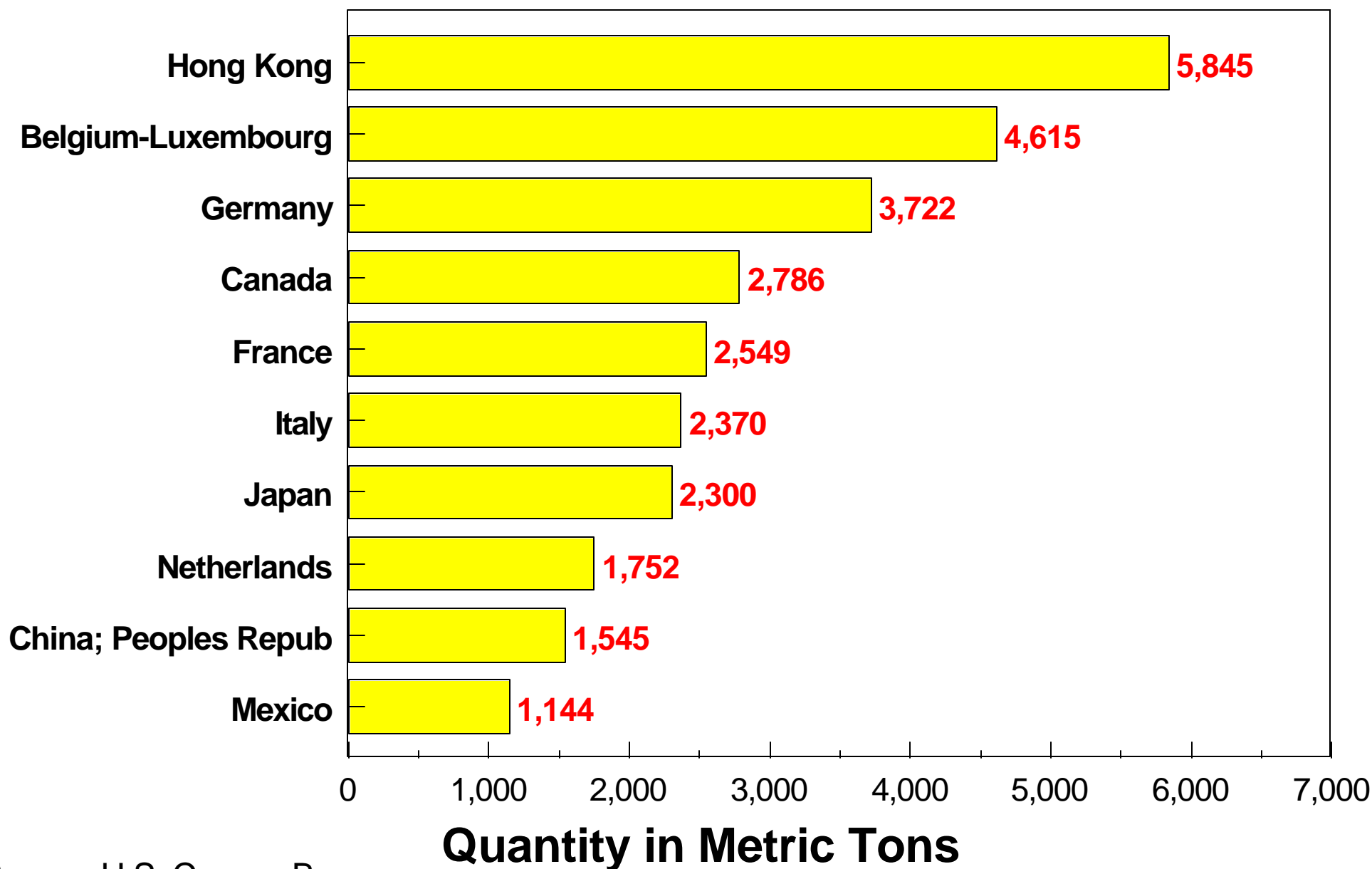
Shelling Stock
3%

Loose Kernels
4%

Closed Shell
12%

Top 10 Pistachio Export Destinations

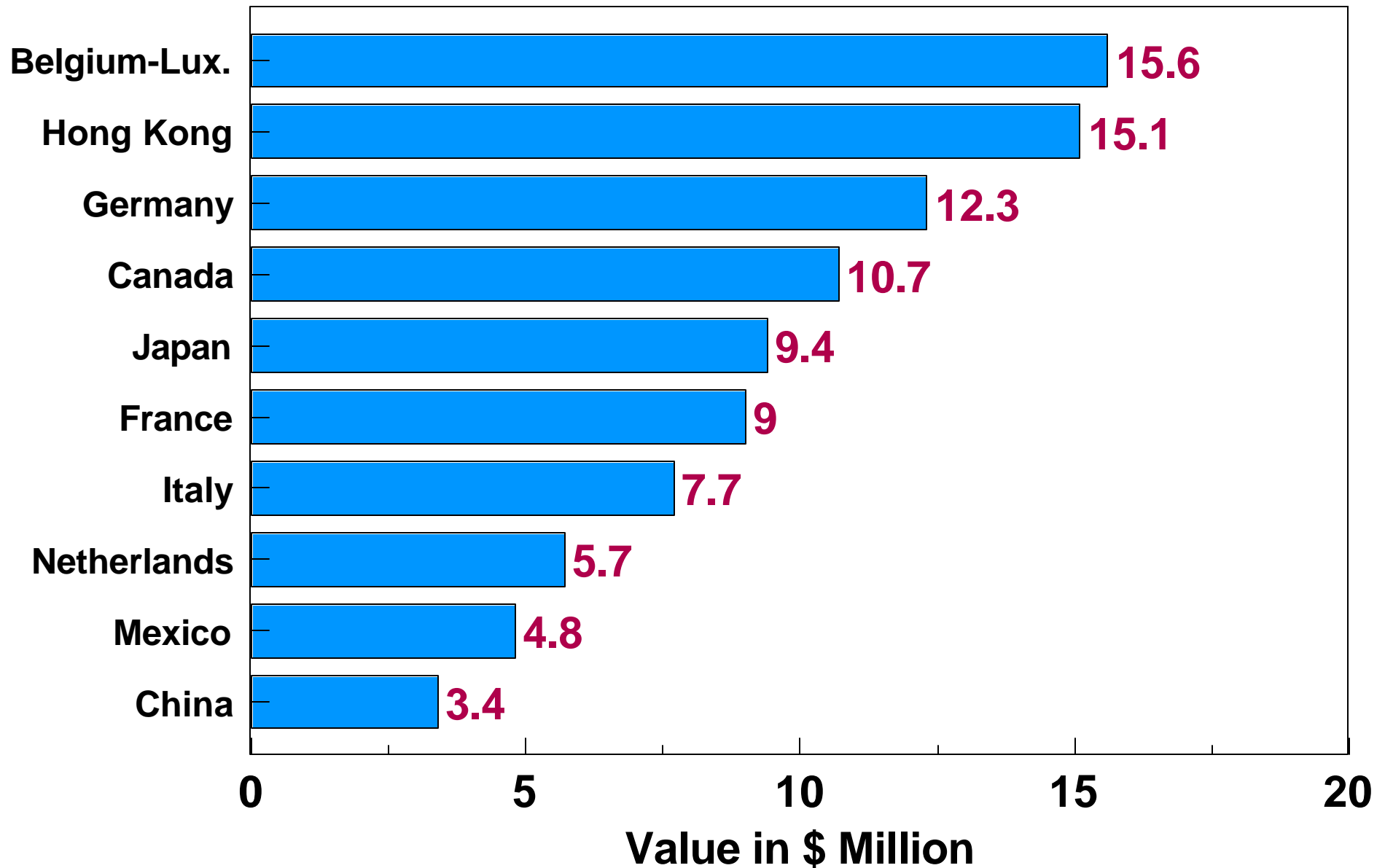
Calendar Year 2001



Source: U.S. Census Bureau

Top 10 Pistachio Export Destinations

Calendar Year 2001



Source: U.S. Census Bureau

2001 Applied Tariff Rates on Pistachios for Selected Countries

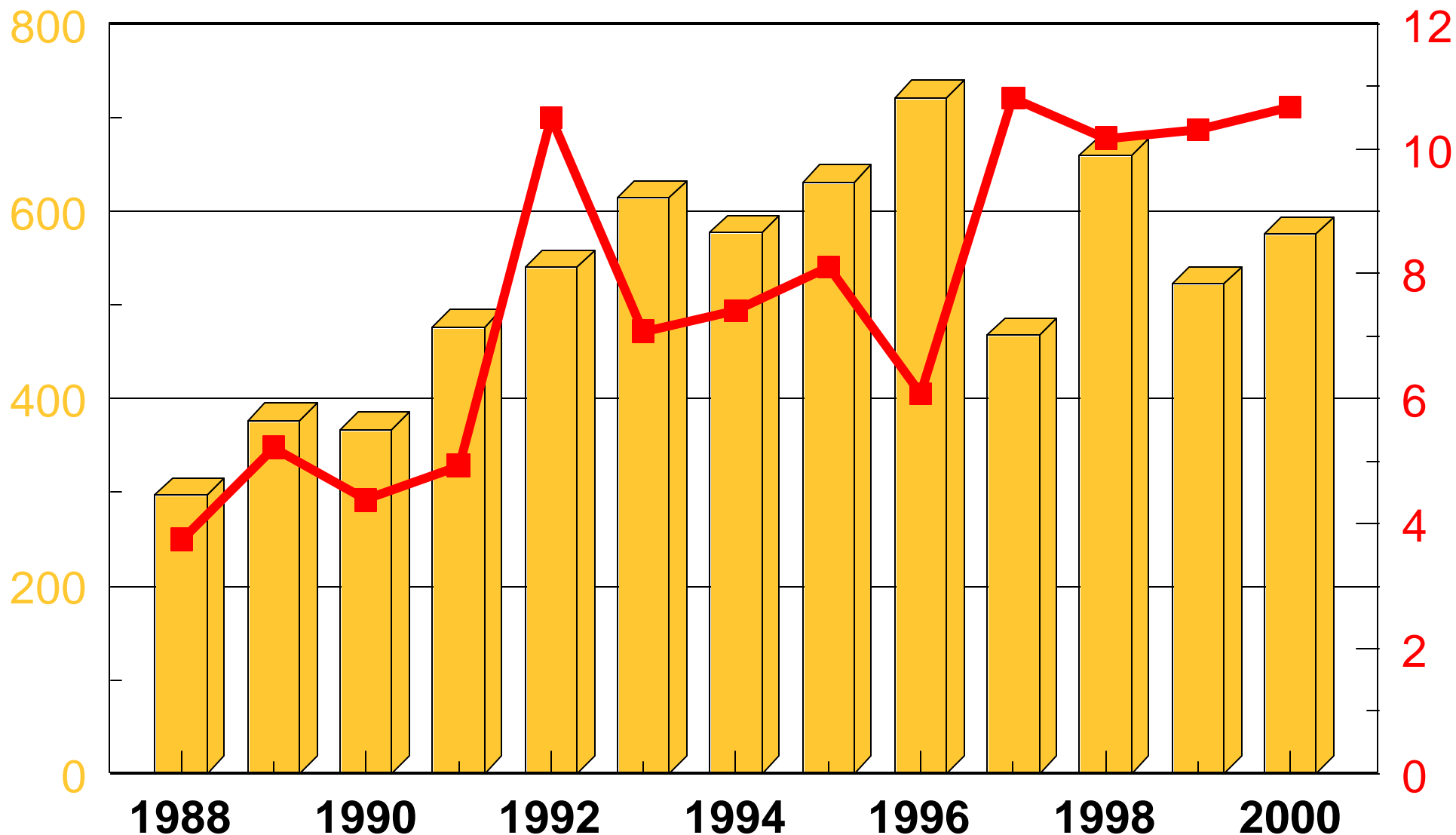
Commodity	Pistachios
HS #	80250
Turkey	44.6%
India	40.4%
Egypt	40%
China	30% plus VAT
Korea	30%
Argentina	25%
Poland	16%
Venezuela	15%
Thailand	10%
EU	1.6%
U.S.A.	0.3%

World Pistachio Exports (Value)

U.S. Market Share

Million Dollars

Market Share



Source: Agricultural Attache Reports & U.S. Census Bureau

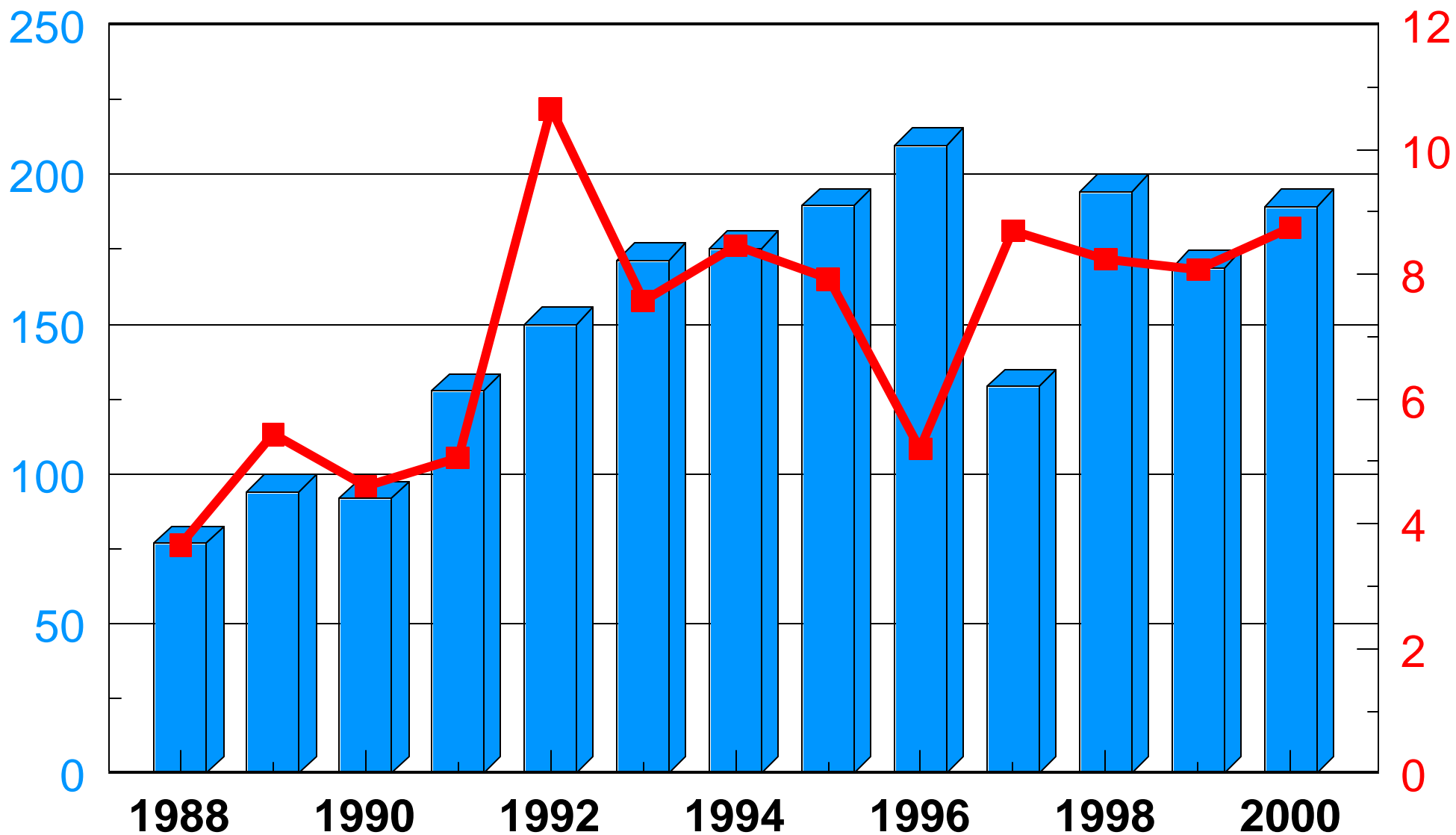
"World" consists of the U.S., Iran, Turkey, Syria, Greece, & Italy.

World Pistachio Exports (Quantity)

U.S. Market Share

1000 Metric Tons

Market Share



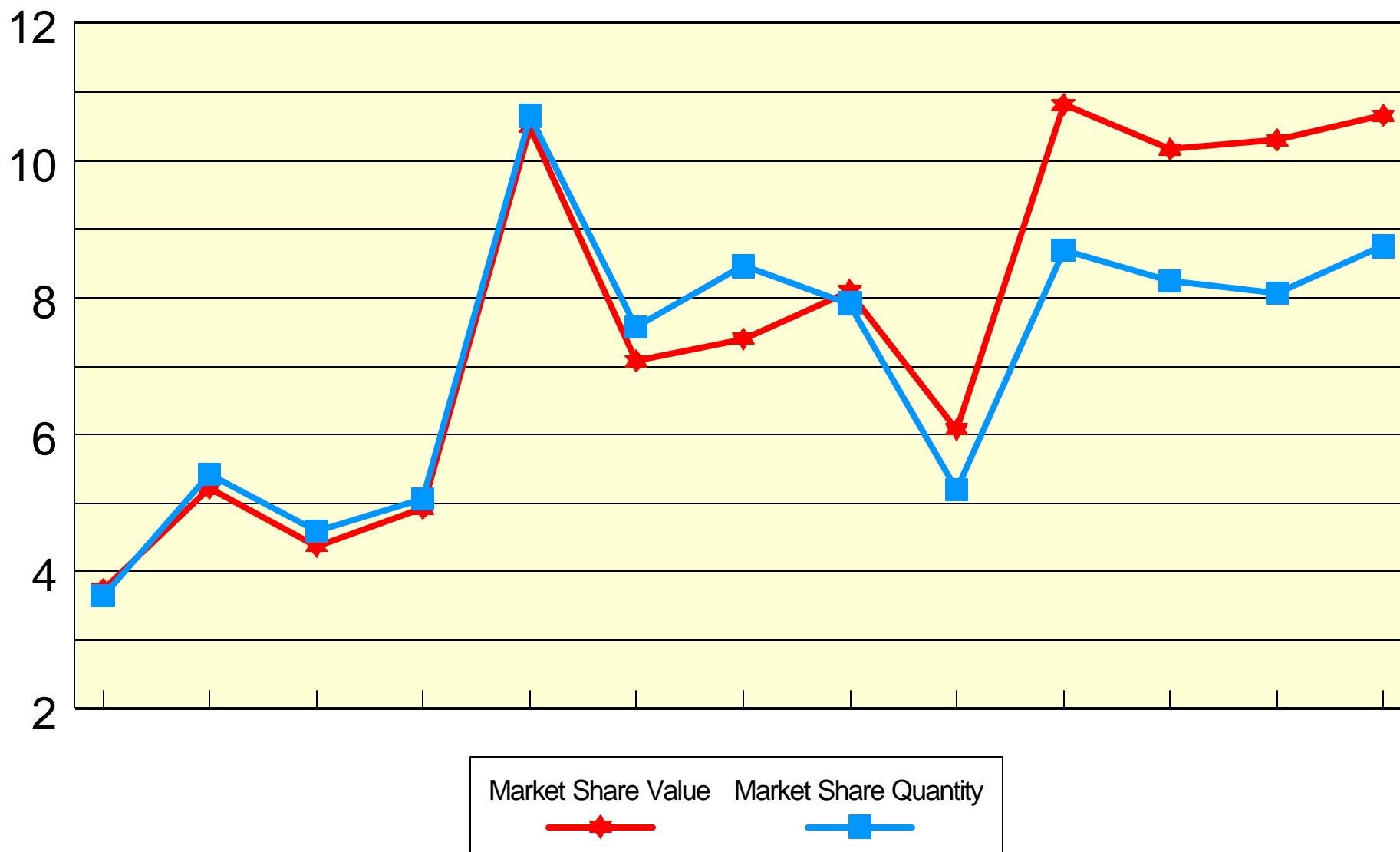
Source: Agricultural Attache Reports & U.S. Census Bureau

"World" consists of the U.S., Iran, Turkey, Syria, Greece, & Italy.

World Pistachio Exports

U.S. Market Share

% Market Share

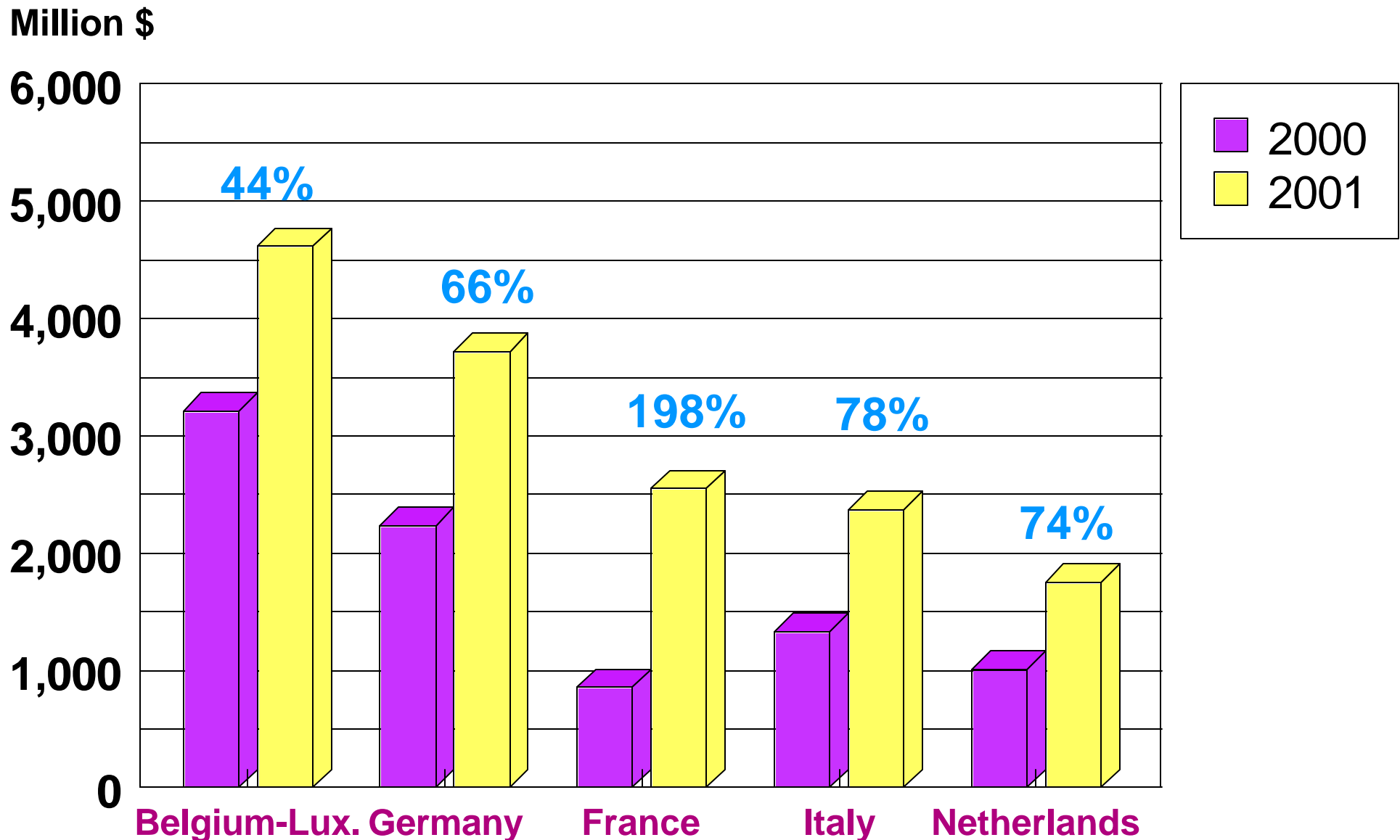


European Markets are Booming

Calendar Year 2001

- Exports to France have increased **198%** from the previous year.
- France has jumped from the 10th largest export market to become the 5th largest destination for U.S. pistachios.
- Exports to Belgium-Luxembourg have increased **44%** from previous year.
- Exports to Germany reached 3722 MT, up **66%** from last year.
- Italy imported 2370 MT of pistachios, up **78%**. Italy is now the U.S. 6th largest market.

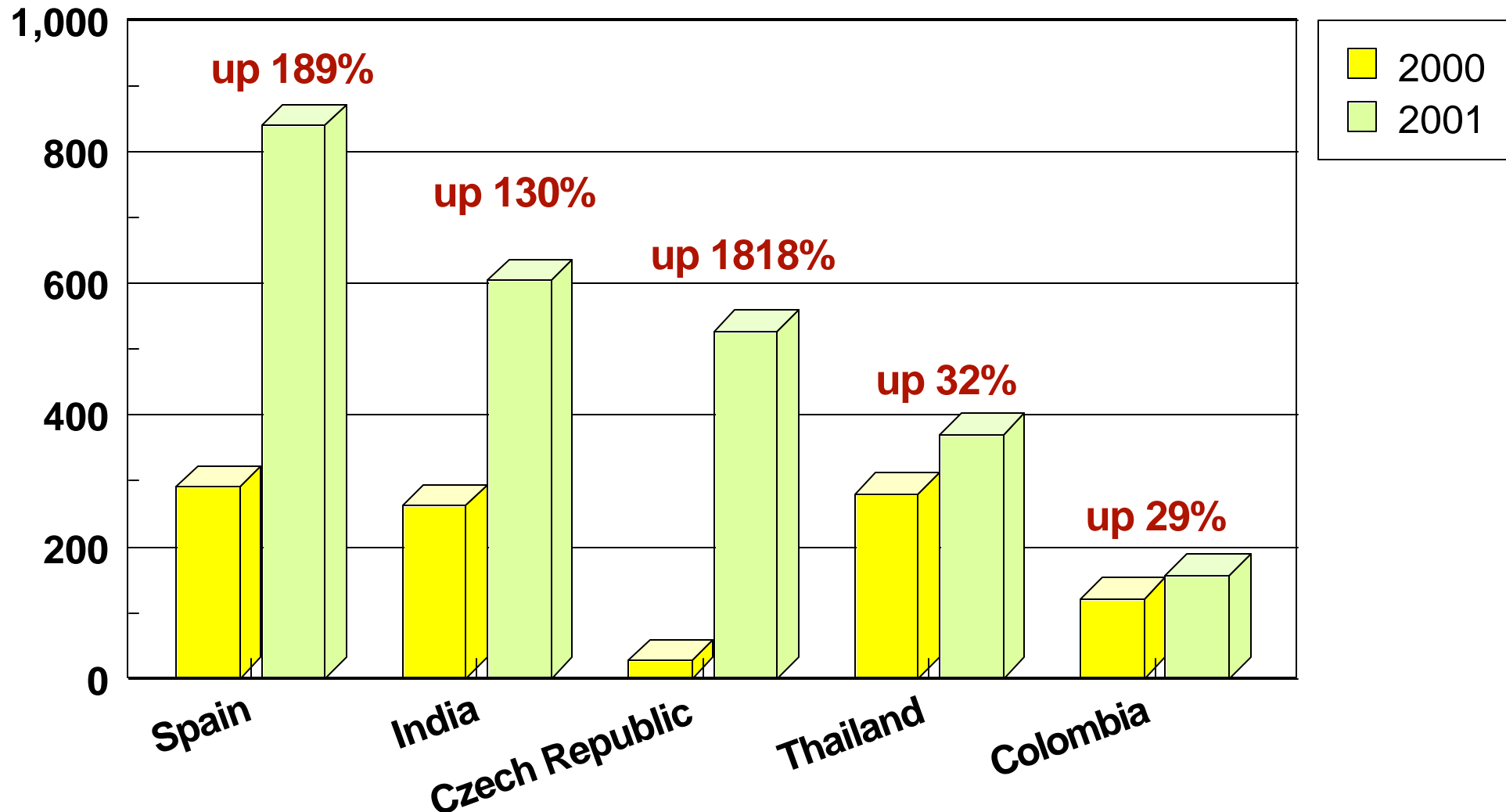
Percent Growth in Pistachio Exports to Major European Markets



Keep an Eye on Future Growth Markets

(Pistachio Export Value *Under* \$1 million)

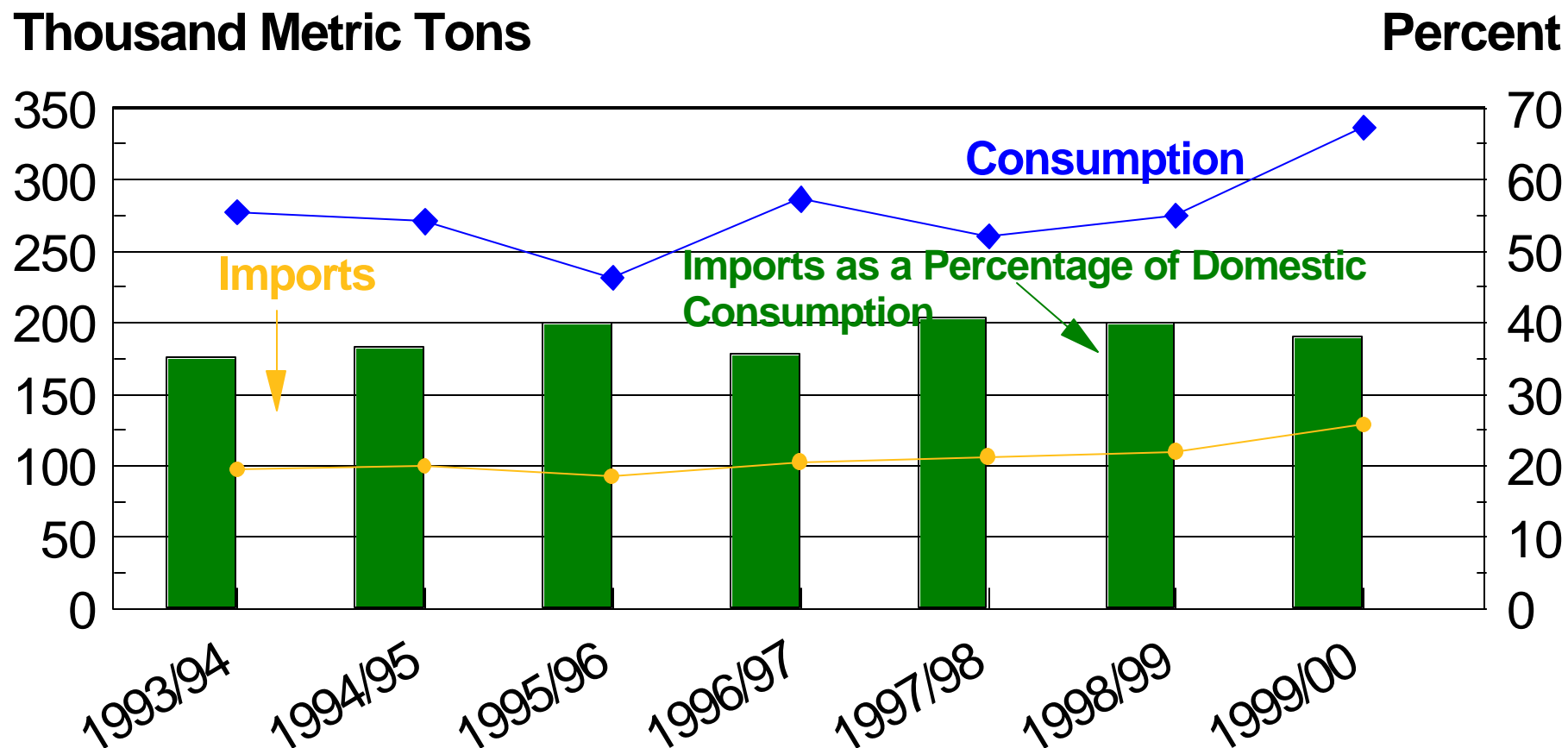
Thousand \$



Calendar Year

Source: U.S. Department of Commerce

U.S. Tree Nut Imports and Market Share of Domestic Consumption

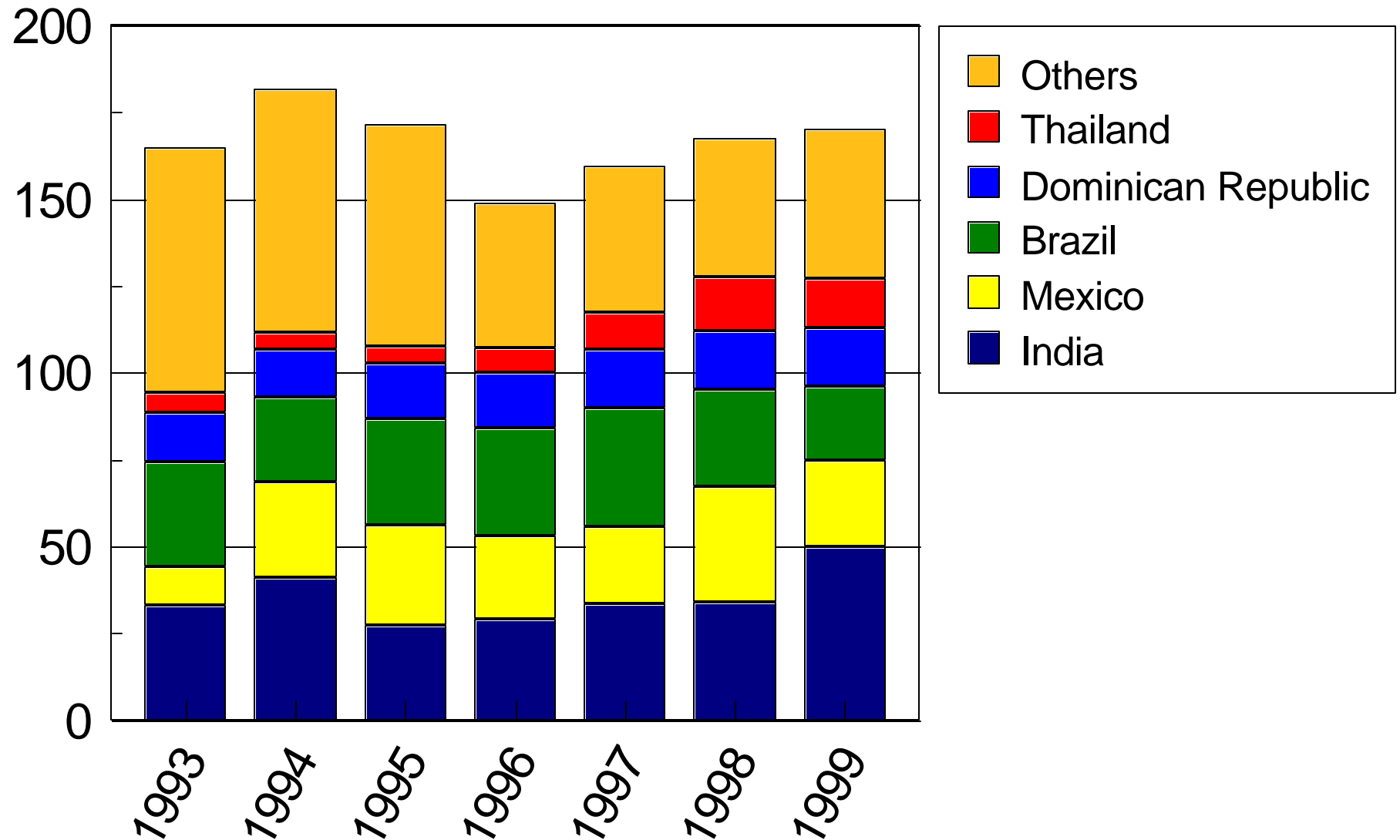


Source: Economic Research Service, USDA

1/ Beginning July 1 for almonds, hazelnuts, macadamia, and peacans; August 1 for walnuts; September 1 for pistachios

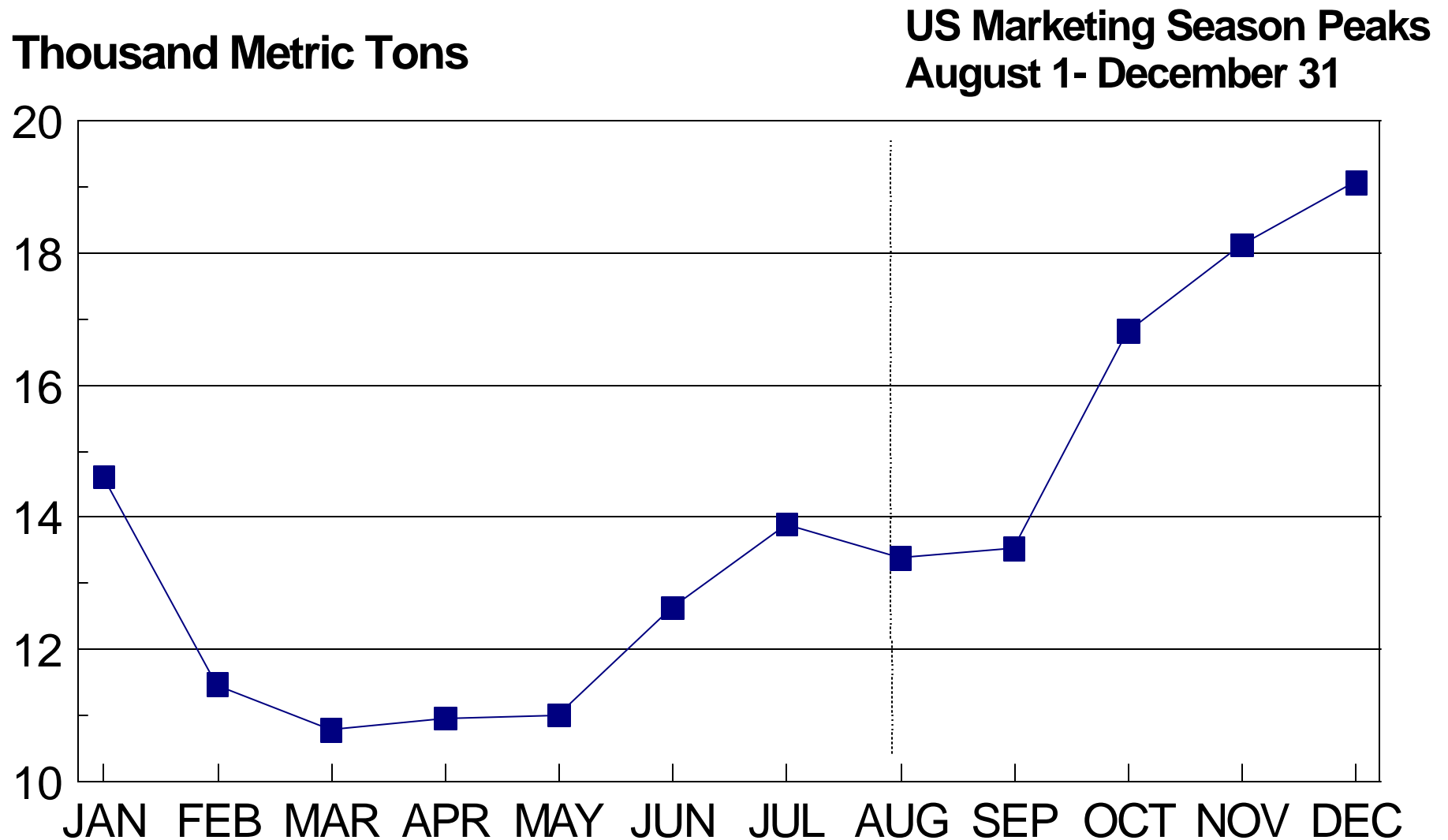
Origins of U.S. Imported Tree Nuts

Thousand Metric Tons



Source: US Bureau of the Census

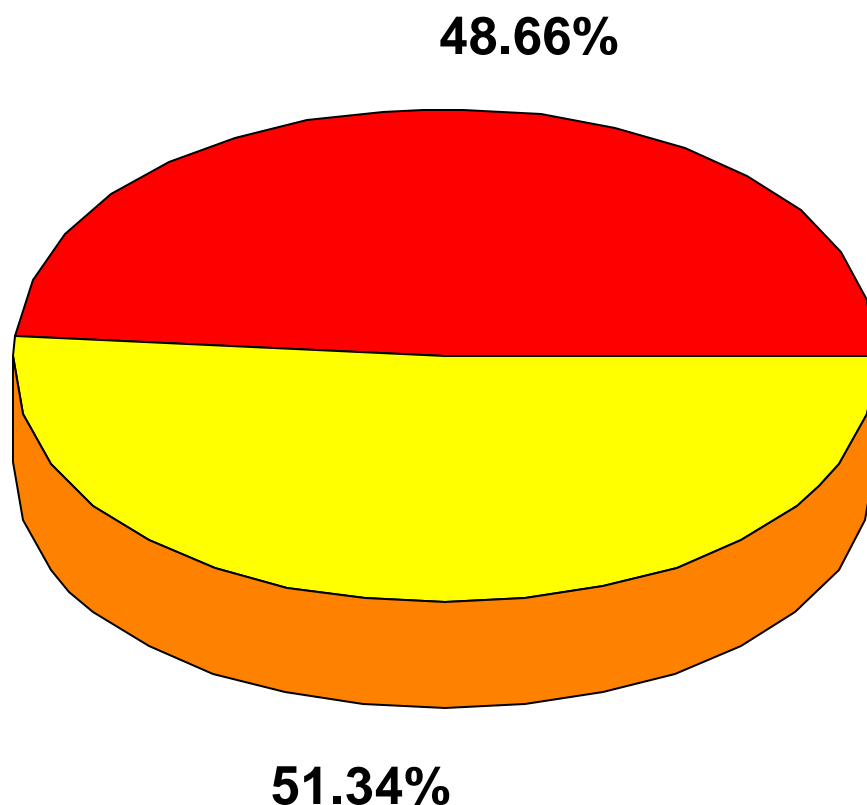
Monthly Imports of Tree Nuts



Note: Average Monthly Imports 1997-99

Source: US Census Bureau

Share of Tree Nut Imports in Relation to the U.S. Marketing Season



Marketing Season Peaks August 1-December 31

Based on Average Monthly Imports 1997-99

Source: US Census Bureau